Flowcharting Standards – Please use ONLY the symbols shown below, following these guidelines:
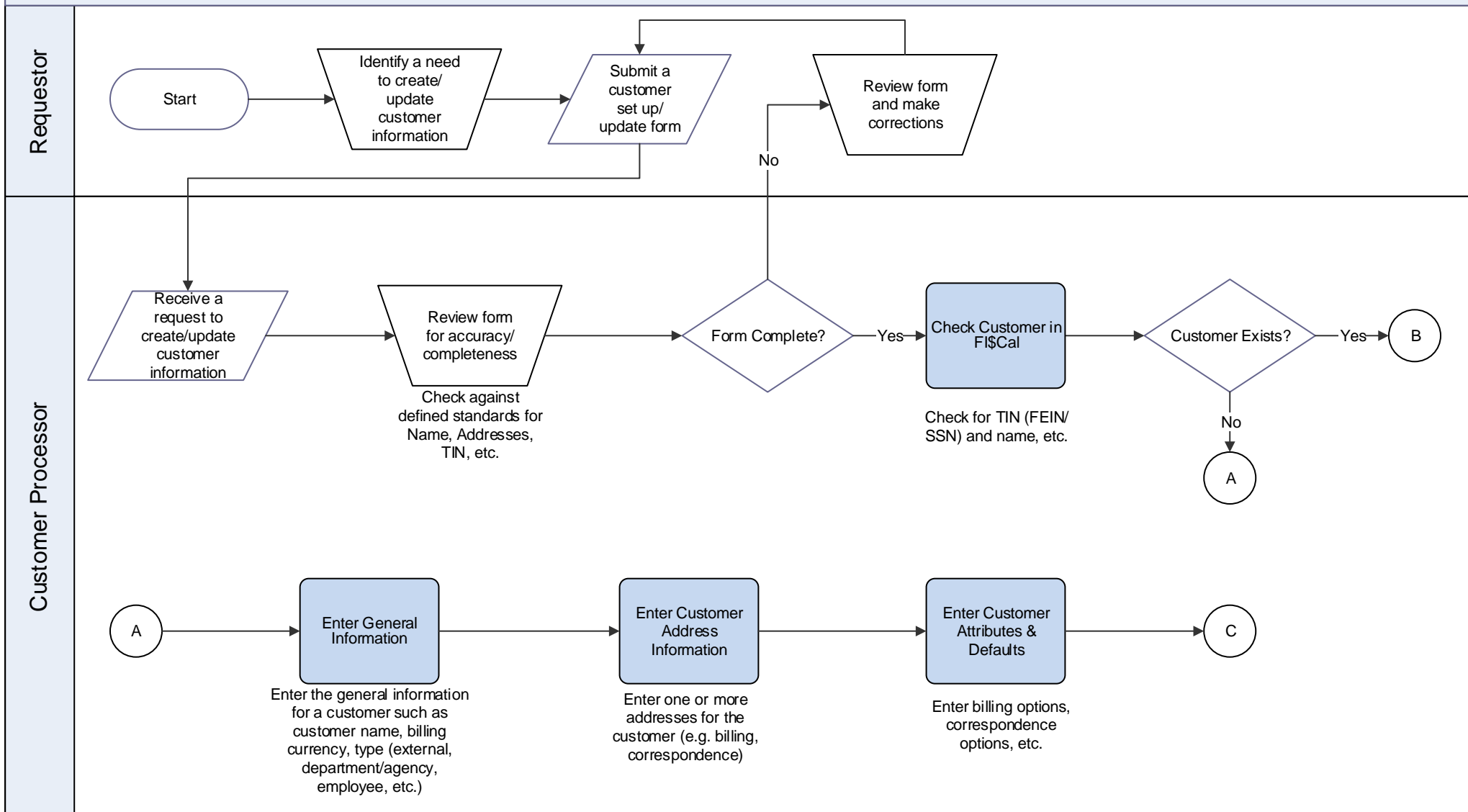
Template Key

Start/End - Indicates point at which the process begins or ends. Does not represent any activity.

Decision - shows a decision point, such as yes/no. Each path emerging from the diamond must be labeled with one of the possible answers.

System Task - Represents an individual step or activity in FI$Cal.

Manual Task - Represents an individual step or activity in the process that is made out of FI$Cal.

Input Documents – A paper document (or email) that is used for entering data in the process. For electronic data should be use the Interface shape.

Connector - On/Off-Page Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. Connectors are labeled with UPPER CASE letters.

Interface – Data conversion from one electronic system to another.

Batch Process - Represents a batch process within FI$Cal. Use a verb phrase (Process Invoice) NOT a noun phrase (Invoice Processing) to describe the step.

Flow Arrow

Intra Integration Process - A input or Output to some other process within the same capability

Output Documents - An electronic document that is created by the process and can be printed (for example – any kind of report).

Role

Swim lanes used to indicate which user role has primary responsibility for performing steps in the process. If an activity involves participation by more than one role, place it in the swim lane for the role with primary responsibility, or put it on the line that divides both roles.

AR1 – Set up and Maintain Customers

Requestor

Start → Identify a need to create/update customer information → Submit a customer set up/update form → Review form and make corrections

Customer Processor

Receive a request to create/update customer information → Review form for accuracy/completeness

Check against defined standards for Name, Addresses, TIN, etc.

→ Form Complete? — No (to Review form and make corrections) / Yes → Check Customer in FI$Cal

Check for TIN (FEIN/SSN) and name, etc.

→ Customer Exists? — Yes → B / No → A

A → Enter General Information → Enter Customer Address Information → Enter Customer Attributes & Defaults → C

Enter the general information for a customer such as customer name, billing currency, type (external, department/agency, employee, etc.)

Enter one or more addresses for the customer (e.g. billing, correspondence)

Enter billing options, correspondence options, etc.

FI$Cal
Financial Information System for California
The Next Generation

AR1 – Set up and Maintain Customers

Customer Processor

C — Continuation of new customer set up steps

→ Enter TIN Information

→ Link to Existing Customer Contact?

- Yes → Select Existing Customer Contact
- No → Enter Contact Information

Enter information such as name, email address, phone, mailing preferences for one or more contacts

→ Notify Requestor

Customer is available for billing/receivables transactions

→ Customer/Vendor Link Process

→ End

B — Continuation of customer update steps

→ Update Requested Information

Updates to General Info, Addresses, Contacts, etc.

→ Notify Requestor

Customer is available for billing/receivables transactions

→ TIN Updated?

- No → End
- Yes → Customer/Vendor Link Process → End